



(U) Surging U.S. Strategic Energy Interest in West Africa

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(U) An oil boom, led by U.S. investment of tens of billions of dollars and reminiscent of the expansion in the Persian Gulf in the 1970s, is now occurring in West Africa. Oil output in the region is forecast to double within 5 years. The United States will be relying on West Africa for at least 25% of its imported oil by 2015, possibly by 2010. New discoveries of oil have been pushing estimates of oil reserves in West African countries higher by billions of barrels every year.

(S) Much of the new oil development in the region is in offshore deepwater facilities. Although previously believed to be relatively safe from terrorist attack, recent takeovers of offshore oil rigs by Nigerian militants have demonstrated the need for increased naval security in deepwater. Security is necessary for thousands of U.S. oil workers, U.S.-owned drilling platforms, floating storage facilities, and oil tankers. Stability in all West African countries is a growing concern for the United States as it seeks to ensure a steady flow of oil from this region.

(U) West African oil is a preferred oil for the United States as it is a light, premium crude oil (low sulfur, low chloride, and low paraffin content). U.S. and European refiners prefer light West African crude because gasoline is easily distilled from it and it causes little air pollution when refined. By comparison, Venezuelan and other Latin American oil export crude oils are becoming heavier, necessitating upgrades to refineries to be able to process them. In addition, West African oil tankers can reach the east coast of the United States in about 20 days (40 days is required for oil from Saudi Arabia) and need not pass through any choke points, such as straits or canals.

(U) A growing demand for liquefied natural gas (LNG) in Europe and the United States will lead to an even greater role for West Africa in energy markets. US and European energy companies are building LNG plants (to liquefy the gas) in Equatorial Guinea, Nigeria, Sao Tome, and Angola. U.S. companies are gearing up for increased deliveries of LNG. Although the U.S. currently has only 4 LNG re-gasification plants (to turn the liquid back into gaseous form), industry experts expect about 15 new plants to be constructed in the U.S. in the near future.

(S//SI) We can expect that the future U.S. energy strategy for West Africa will include the use of diplomatic and trade leverage, as well as military strength to ensure that the flow of oil to the United States and its allies is unimpeded. Over the next year, the SIGINT Enterprise should anticipate customer requirements that will make stability and security in the Gulf of Guinea a much higher priority. Africa may not always be important on the international political scene, but it is important on the economic scene - and will play a more significant role in the future, supplying more and cleaner energy sources.

(U) A more detailed [SINIO Council Perspective](#) on this issue is available. It and other perspectives can be found off the [SINIO homepage](#) ("go sinio").

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